

# **BIODIESEL 2020:**

## **Global Market Survey, Feedstock Trends and Forecasts**

Multi-Client Study, 2nd Edition (2008 release), 685 pages Published by Emerging Markets Online



# BIODIESEL 2020:

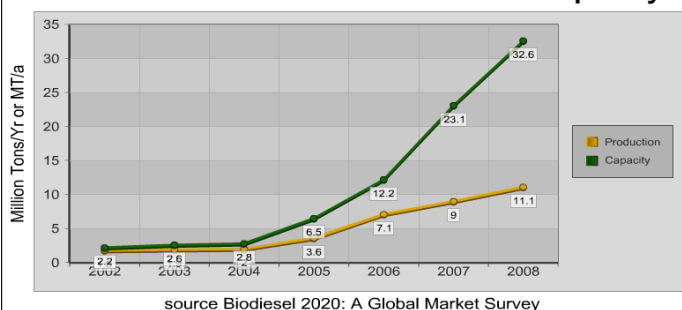
## Global Market Survey, Feedstock Trends and Market Forecasts

### Introduction and Executive Summary

#### Rapid Global Market Growth

The global market for biodiesel is poised for explosive growth in the next ten years. Although Europe currently represents 80% of global biodiesel consumption and production, the U.S. is now ramping up production at a faster rate than Europe, and Brazil is expected to surpass U.S. and European biodiesel production by the year 2015. It is possible that Biodiesel could represent as much as 20% of all on-road diesel used in Brazil, Europe, China and India by the year 2020 with the pursuit of second generation, non-food feedstocks. Biodiesel demand and over-capacity in Europe, the US and Asia is driving investment in the global trade of alternative feedstocks.

#### World Biodiesel Production and Capacity



#### Trends, Outlook, & Opportunities

In the USA, the market for biodiesel is growing at an alarming rate - from 25 million gallons per year in 2004 to 450+ million gallons in 2007. The total biodiesel being sold in the U.S. amounts to less than 1% of all diesel consumption. In Europe, biodiesel represents 2-3% of total transportation consumption and is targeted to reach 6% by 2010. In China, India, Brazil and Europe, economic and environmental security concerns are giving birth to new government targets and incentives, aimed at reducing petroleum imports and increasing the consumption and production of renewable fuels. Europe, Brazil, China and India each have targets to replace 5% to 20% of total diesel with biodiesel. If governments continue to aggressively pursue targets for second generation fuels; and continue to promote research and development in investment in alternative, non-food feedstocks such as grease tallow, jatropha, castor, algae, and renewable diesel, the prospects for biodiesel will be realized faster than anticipated. *Biodiesel 2020* finds that each of these variables will be essential to the eventual success of these targets.

#### Feedstock Trends and Next Generation Fuels

For this market study, Emerging Markets Online examines the trend towards lower cost multiple feedstock options, and provides details on new feedstocks and global trade trends. This study provides details of the leading jatropha curcas projects in India, Africa, Asia, and Latin America. This study also reviews major projects in progress for lower-cost feedstocks from renewable diesel, tallow, yellow grease, and waste recycling. Algae based biodiesel projects are also reviewed, along with technologies for renewable diesel via pyrolysis, biomass waste to liquids via GTL, Fischer-Tropsch gas to liquids and others.

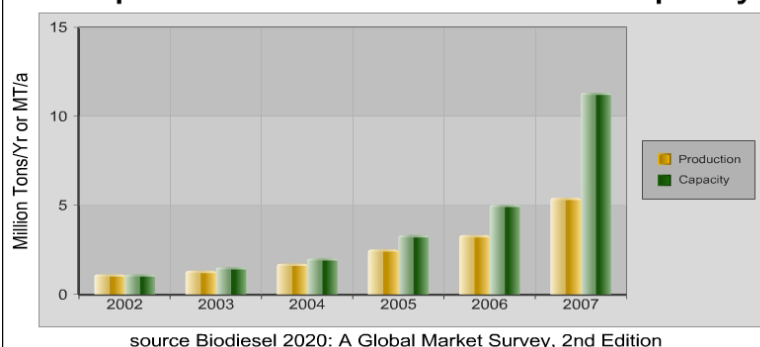
#### Jatropha Commercial-Scale Projects Under Development



#### Market Forecasts and Scenarios to 2020

This study tracks the global markets for biodiesel growth, and provides 5 to 10 year forecasts for biodiesel demand, consumption and production. Europe, the U.S., Brazil, China, and India are each covered as market studies. Proprietary forecasts developed for this study are also used to produce 2020 "Scenarios" for Europe, the U.S., Brazil, China, and India. *Biodiesel 2020* also provides an outlook and scenarios for the transition from first generation to second generation biodiesel projects in developed countries and in the emerging markets.

#### Europe Biodiesel Production and Capacity



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## Global Market Survey, Case Studies and Forecasts

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